



California Tourism Advertising Effectiveness Research Findings

August 2003

**Presented by
Strategic Marketing & Research, Inc.**



Background & Objectives

- Measure advertising recall among target audiences;
- Compare awareness to key competitors in markets to determine “share of voice;”
- Assess consumers’ reactions & explore whether the ads communicate the “California attitude;”
- Measure changes in State’s imagery as related to the ad campaign;
- Determine whether the advertising heightened consumer interest in visiting California;
- Examine the differences in impact within the three groups of target markets; and
- Provide recommendations for refining the State’s advertising efforts.





Methodology

- Combined Internet and telephone survey
- In total, 1609 surveys were completed
 - 557 in the A markets
 - Denver, Portland, Salt Lake City & Seattle
 - 514 in the B markets
 - Albuquerque, Boise, Colorado Springs & Spokane
 - 538 in the C markets
 - Las Vegas, Medford, Phoenix, Reno & Tucson



Advertising Effectiveness Measures of Success

Reach	→	Advertising Awareness
Message	→	Creative Evaluation
Influence Attitudes	→	Comparative Image Assessments
Build Interest	→	Comparative Interest in Visitation
Generate Travel	→	Incremental Travel



The Advertising Campaign

Spring 2003 Advertising Expenditures

Television	\$2,580,748
Print	\$1,535,284
Total	\$4,116,032

The TV campaign focused on three distinct groups of markets

Campaign Expenditures	2003	Media Weight
A Markets (Denver, Portland, Salt Lake City, Seattle)	\$1,690,830	12 Weeks -1500 points
B Markets (Albuquerque, Boise, Colorado Springs, Spokane)	\$305,240	12 Weeks - 900 points
C Markets (Las Vegas, Medford, Phoenix, Reno)	\$584,678	6 Weeks - 750 points
Television Total	\$2,580,748	



Vacation Imagery

Attributes	CA	CO	FL	HI	NV	NY	TX	Utah
Variety of active outdoor - hiking/climbing/biking	109	108	99	108	92	91	93	99
Has attractive parks	110	109	103	115	84	89	92	99
Provides a good value for the money	101	105	104	99	98	90	105	97
Lots of lakes & boating activities	106	103	113	103	91	92	96	97
Is scenic and beautiful	108	109	103	111	88	93	92	96
Is causal and laid back	105	106	105	114	93	84	98	95
Has lots of quaint small towns	104	105	103	104	91	96	103	94
Is unique	99	97	101	111	96	106	98	92
Has friendly people	102	107	106	114	94	87	100	91
Has a unique and desirable lifestyle	105	109	105	116	91	92	94	89

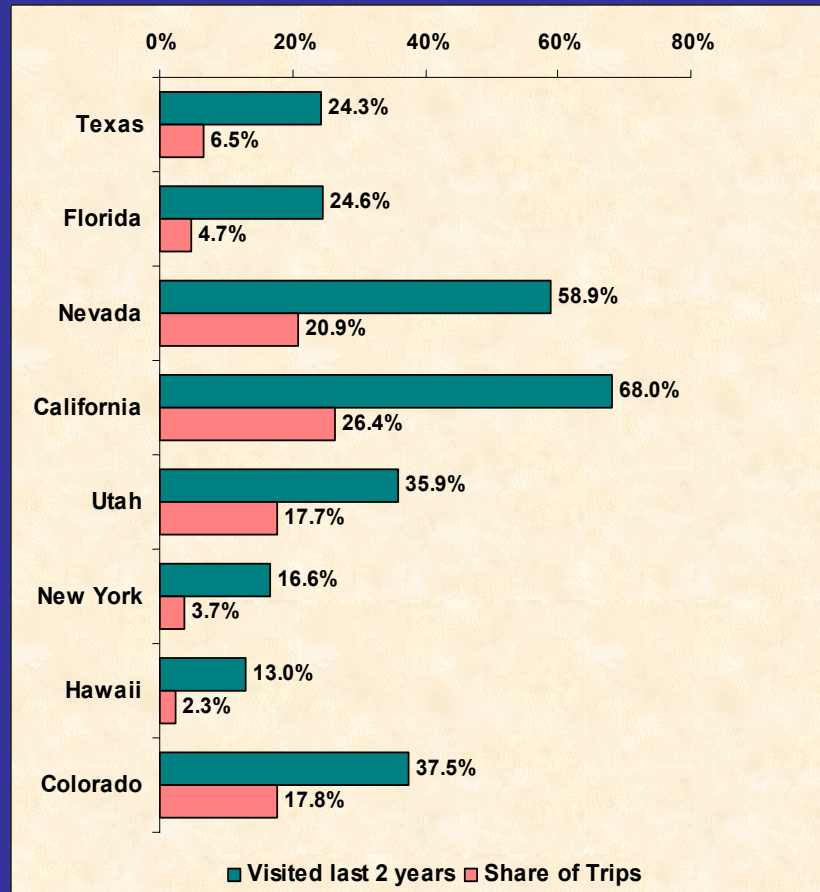


Vacation Imagery

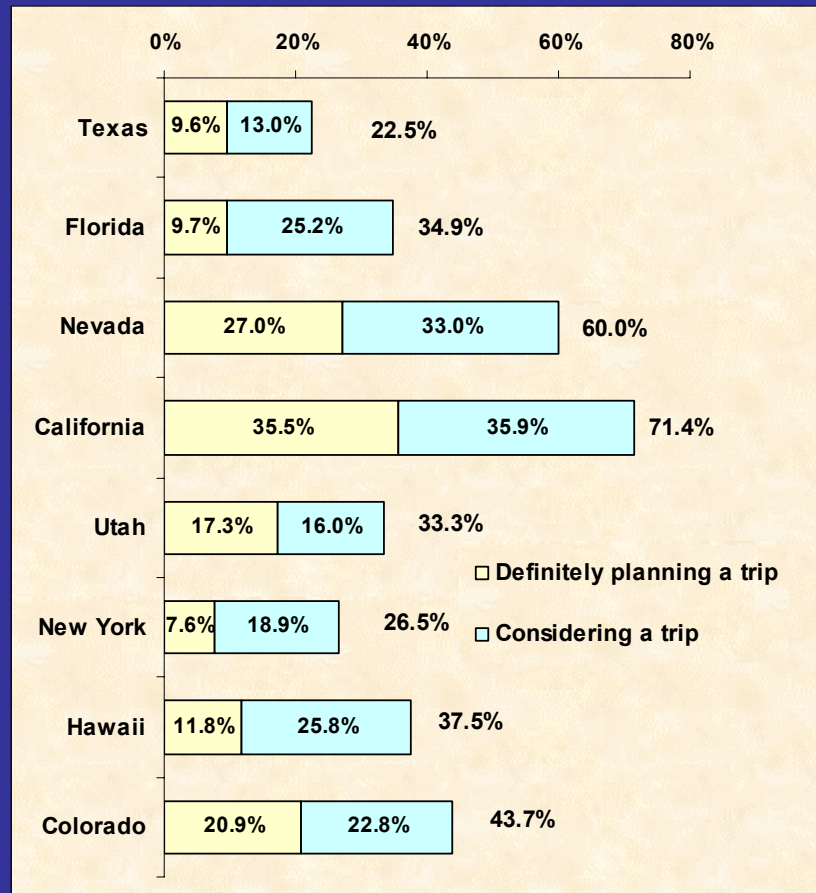
Attributes	CA	CO	FL	HI	NV	NY	TX	Utah
Has interesting historical sites	105	100	102	106	91	105	103	88
Is a place with lots to see and do	109	97	109	109	91	106	92	87
Has diverse urban dining and shopping	111	95	109	107	88	106	98	86
Is fun	108	103	104	108	99	101	93	85
Is free spirited and individualistic	112	101	108	109	98	97	94	81
Is wacky and youthful	110	101	106	113	97	98	94	81
Is culturally diverse	112	92	111	106	91	109	99	80
Has excellent beaches	120	77	130	134	74	86	101	78
Has large exciting cities with exciting nightlife	106	94	105	105	103	115	96	77



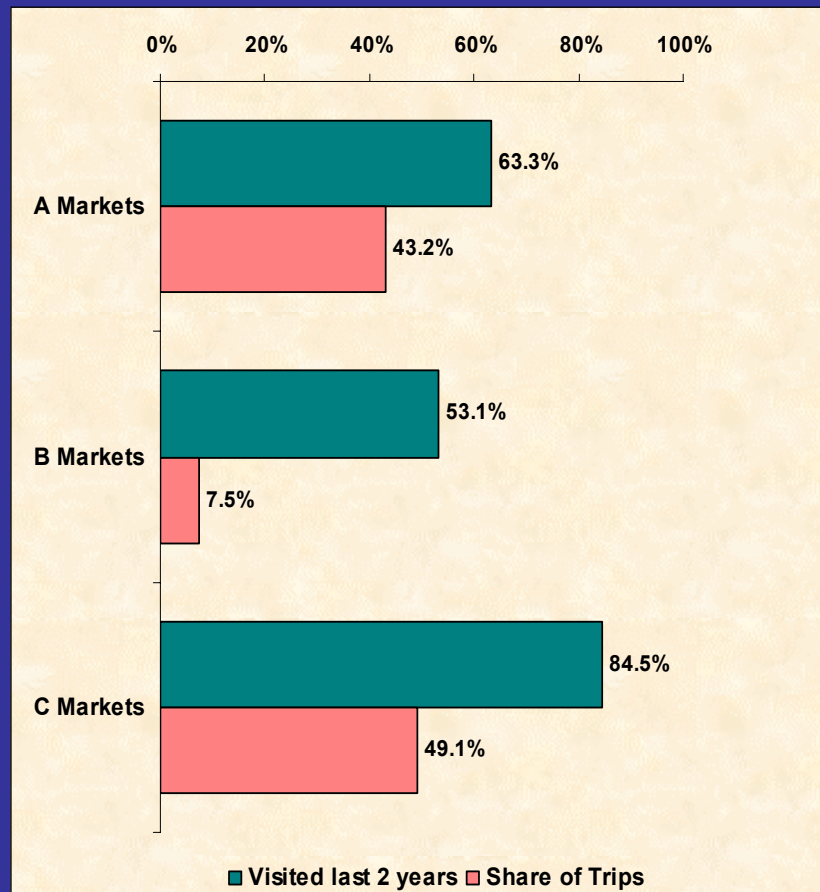
Past Visitation



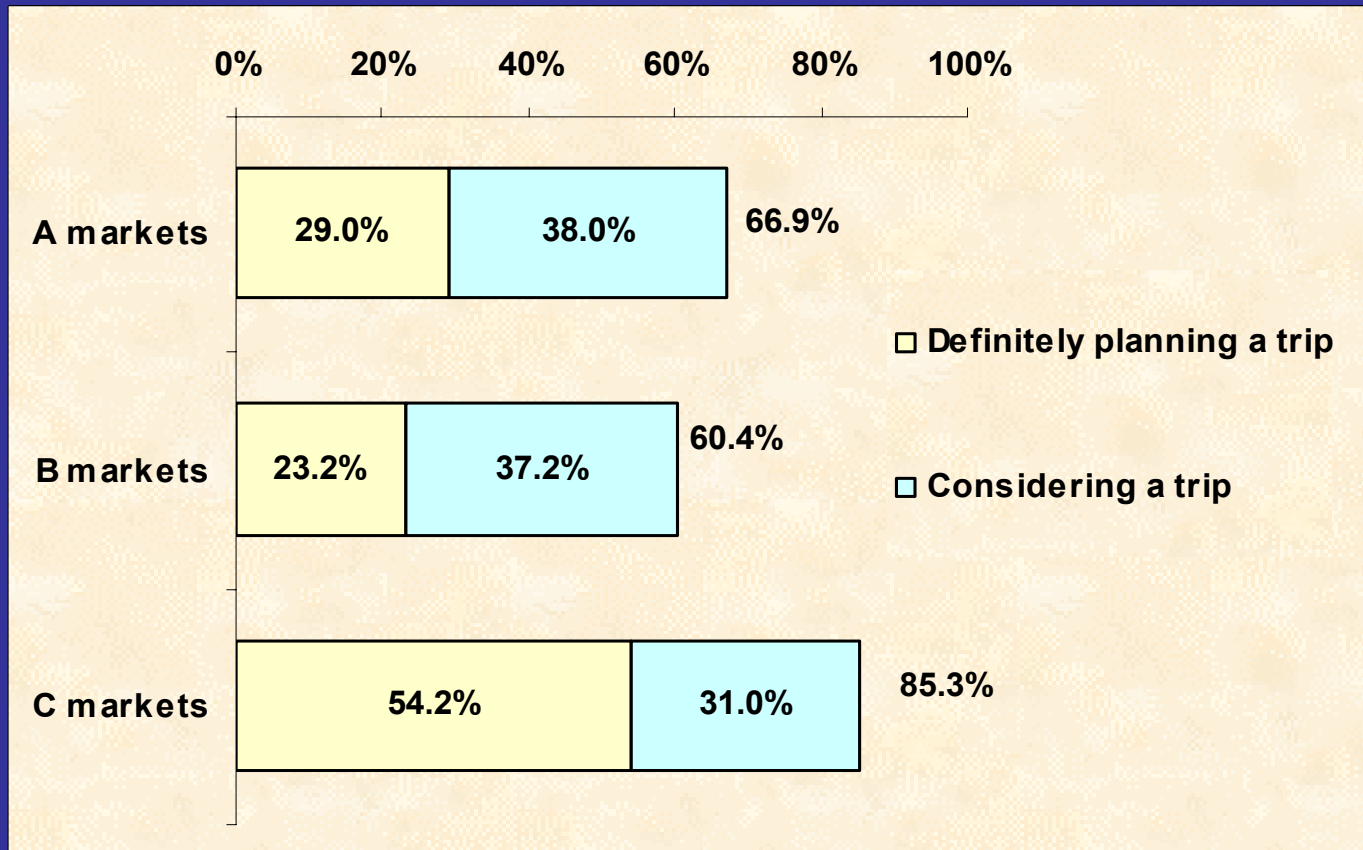
States Respondents are Planning to Visit



Past California Visitation by Markets



Planning to Visit California by Market Type



Reach → Advertising Awareness

Expenditures

Expenditures for...	CA	CO	TX	FL
Television	\$2,580,748	\$150,000	\$5,350,000	\$1,200,000
Print	\$1,535,284	\$929,000	\$2,800,000	\$639,000
Total	\$4,116,032	\$1,079,000	\$8,150,000	\$1,839,000



Reach → Advertising Awareness

Expenditures

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Reach → Advertising Awareness

Print Awareness

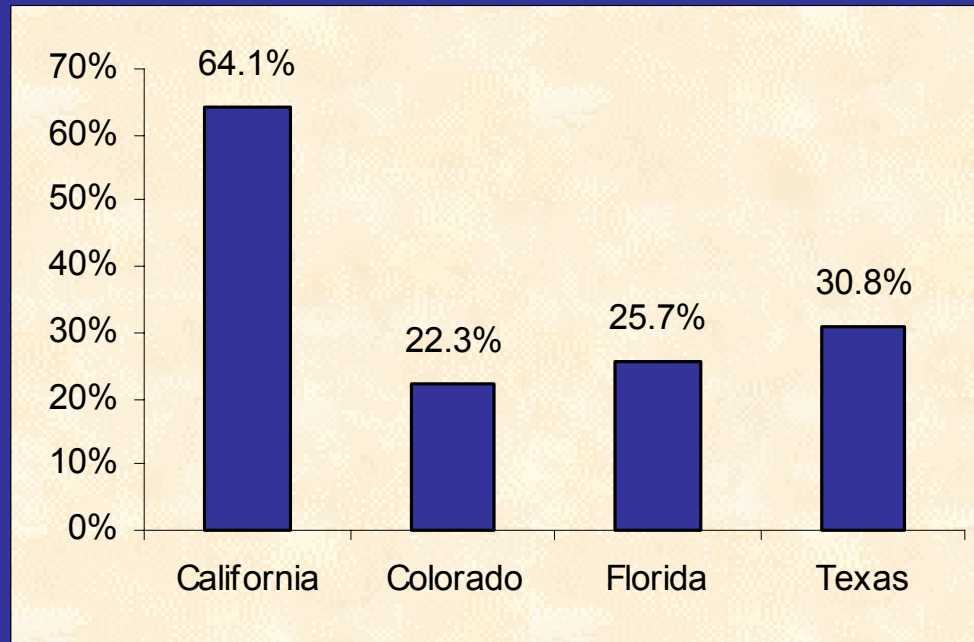
CA - Wine	10.2%
CA - LA	5.3%
CA - San Diego	6.9%

California	16.0%
Texas	13.0%
Colorado	8.8%
New York	7.8%



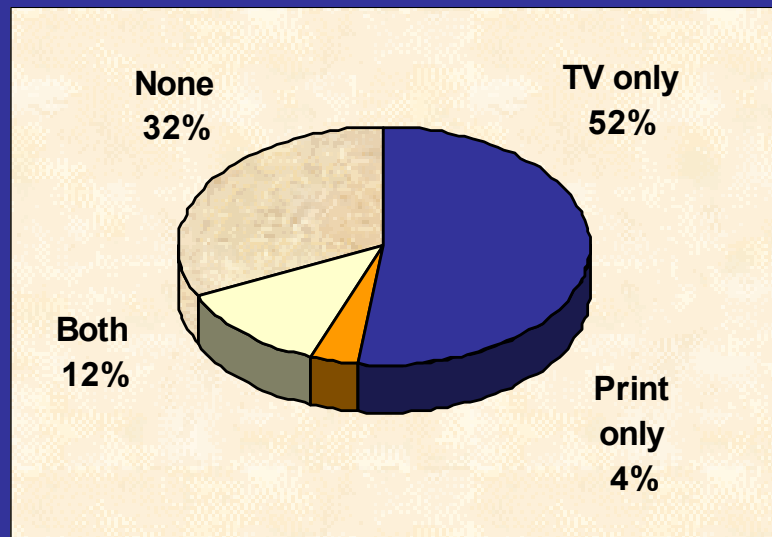
Reach → Advertising Awareness

Television Exposure



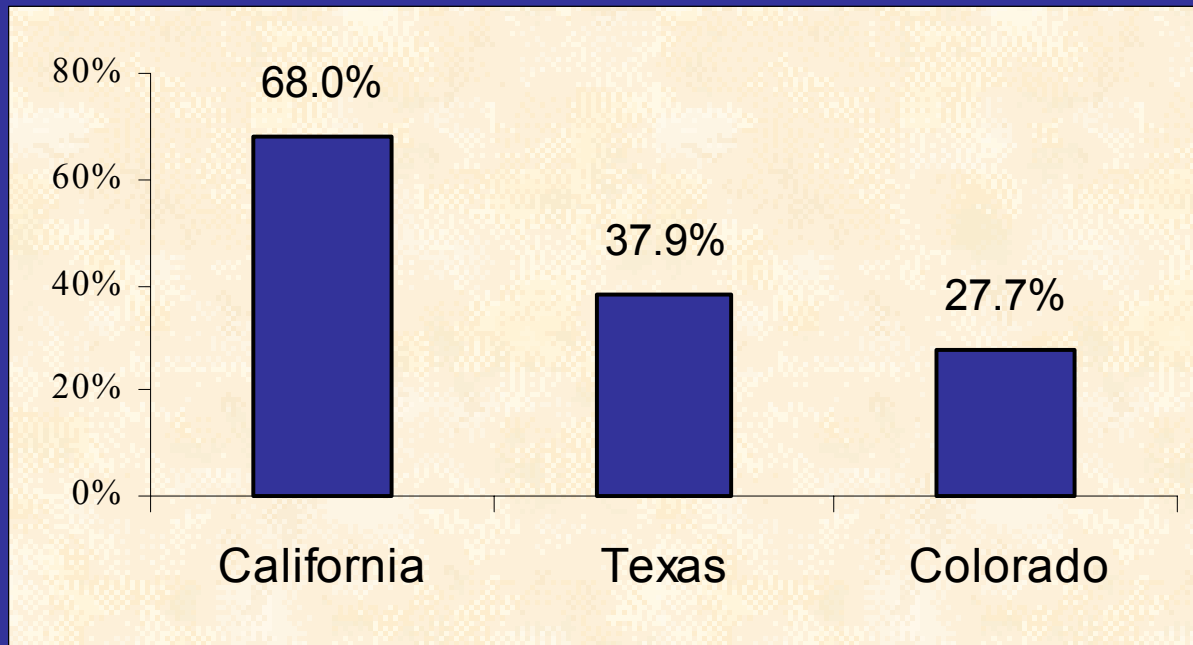
Reach → Advertising Awareness

California Sources of Awareness



Reach → Advertising Awareness

Total Awareness for...

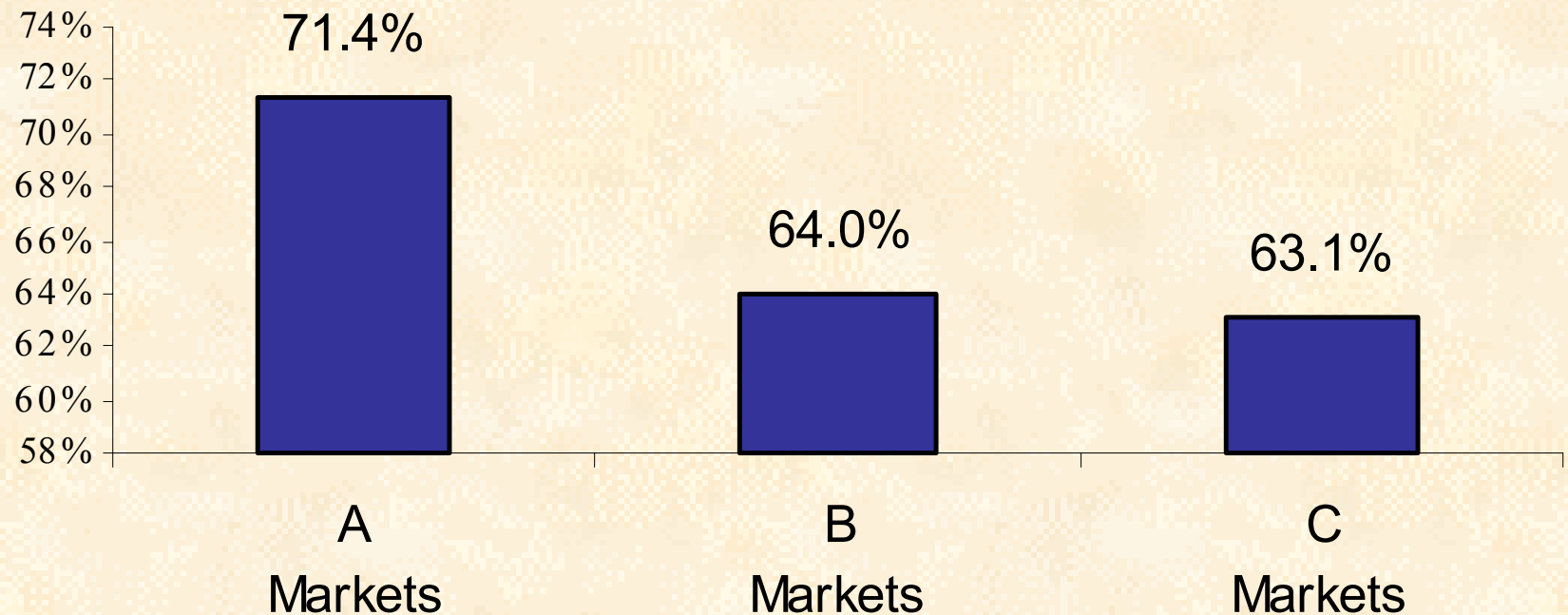


Reach → Advertising Awareness

	Cost to Generate TV-aware Households			
	CA	CO	TX	FL
# HHs	3,904,640	3,904,640	3,904,640	3,904,640
Awareness %	64.1%	22.3%	30.8%	25.7%
Aware HHS	2,502,874	870,734	1,202,629	1,003,492
TV costs	\$2,580,748	\$150,000	\$5,350,000	\$1,200,000
Cost per Household	\$1.03	\$0.17	\$4.45	\$1.20



Effectiveness by Market





Message



Creative Evaluation

Shows more diversity than other commercials. Demonstrates more about the state. Has a sense of humor.”

“That California is fun, kicky and unique. It shows a lot of fun things to do.”

“The ad showed me different things I could do and see in California. Gave me the desire to check it out.”

“Looks very fun – like the celebrities.”

“Fun, hip place for adults and family. Sun, beach, golf, movie stars, fancy dining. Great for relaxing and renewing the spirit, without having to leave the USA.”

“Cool commercial! Told and showed me lots of things – and funny also.”

“That it’s an experience and lifestyle unto itself.”

“Very good ad. It communicated that there are lots of things you can do there and a wide variety of people. It makes you want to start planning a California vacation, even if you had no intention of going to California before you saw the commercial.”



Message → Creative Evaluation

Ratings for...	CO	FL	TX	CA
Shows experiences & places are interesting to you	2.5	3.4	2.3	4.1
Makes you more interested in visiting	2.3	3.5	2.1	4.1
Shows unique place w/ diverse & desirable lifestyle	2.6	3.3	2.4	4.1
Average	2.5	3.4	2.3	4.1



Ratings of Print Ads

Ratings for...	CA San Diego	CA LA	CA Wine	NY	CO	TX
Shows experiences & places interesting to you	2.6	2.6	2.7	2.4	2.7	2.6
Makes you more interested in visiting	2.7	2.5	2.7	2.3	2.8	2.6
Shows unique place w/ diverse & desirable lifestyle	2.6	2.6	2.7	2.3	2.6	2.7
Average	2.6	2.6	2.7	2.4	2.7	2.6



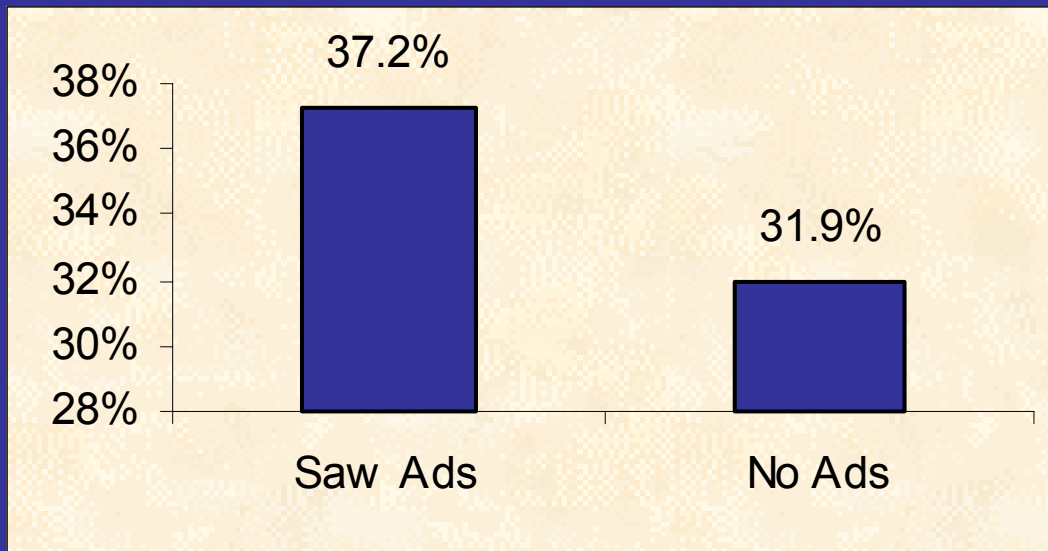
Influence Attitudes Comparative Image Assessments

Saw any California Ad	No ads	Ads	Diff.	* Statistically significant differences
Is causal and laid back	3.6	3.8	0.2*	
Is fun	3.9	4.1	0.2*	
Is wacky and youthful	3.7	3.9	0.2*	
Has excellent beaches	3.9	4.0	0.1	
Lots of lakes & boating activities	3.8	3.9	0.1	
Is culturally diverse	4.0	4.1	0.1*	
Has lots of quaint small towns	3.7	3.8	0.1	
Variety of active outdoor – hiking/climbing/biking	4.0	4.1	0.1*	
Is unique	3.6	3.7	0.1	
Is a place with lots to see and do	4.1	4.2	0.1	
Is free spirited and individualistic	3.9	4.0	0.1	
Is scenic and beautiful	4.0	4.1	0.1	
Has diverse urban dining and shopping	3.9	4.0	0.1*	
Has friendly people	3.5	3.6	0.1	
Has large exciting cities with exciting nightlife	4.0	4.0	0	
Has attractive parks	4.1	4.1	0	
Has interesting historical sites	3.9	3.9	0	
Provides a good value for the money	3.5	3.5	0	



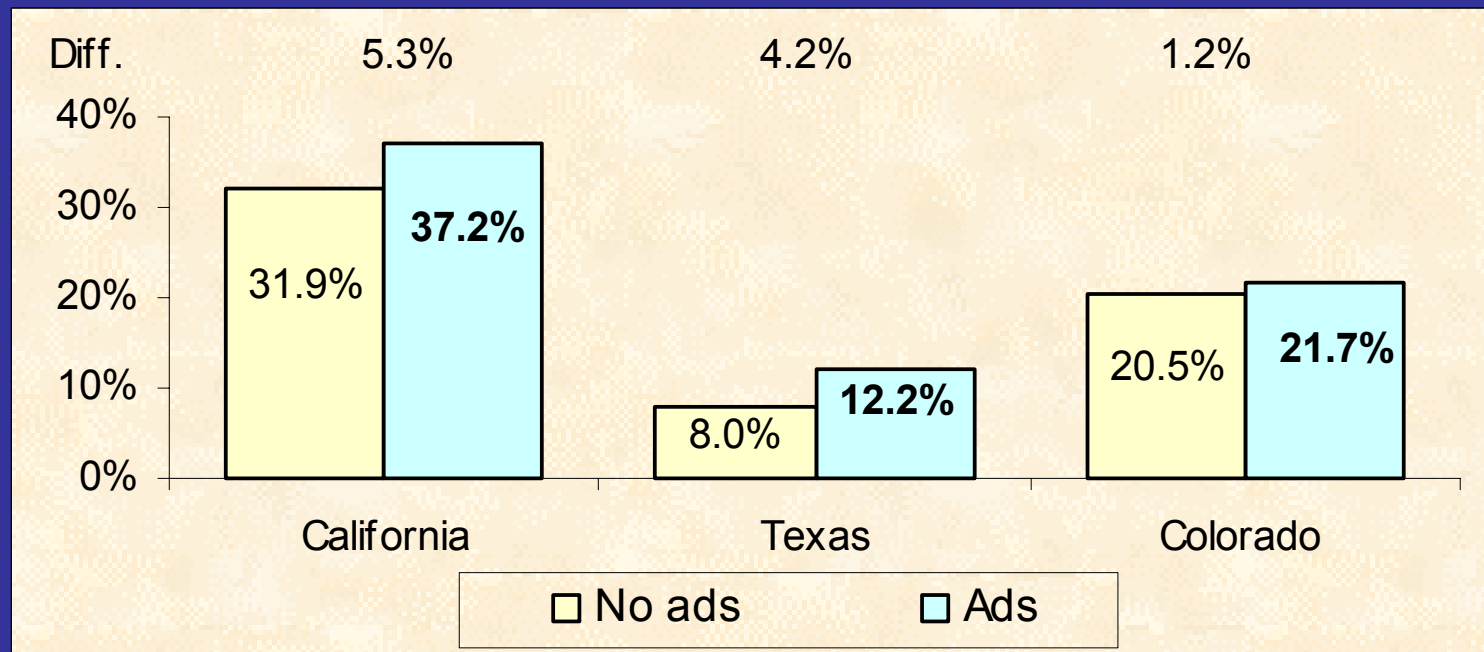
Build Interest → Comparative Interest in Visitation

Impact of California Ads in Generating Interest in Visiting



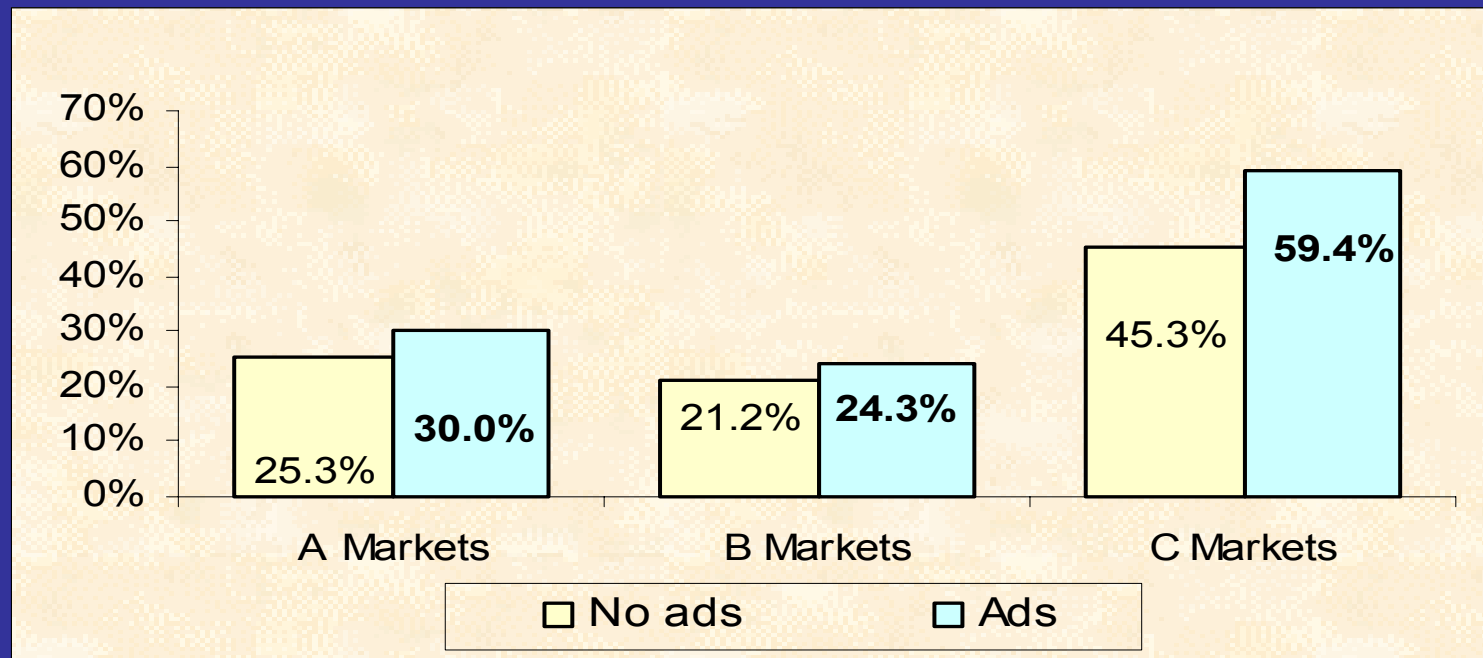
Build Interest → Comparative Interest in Visitation

Impact of Ads in Generating Interest in Visiting



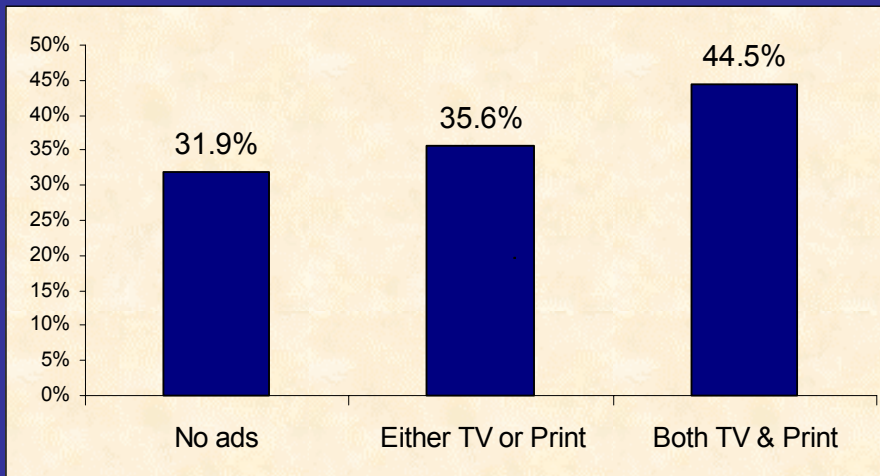
Build Interest → Comparative Interest in Visitation

Impact of Ads in Generating Interest in Visiting

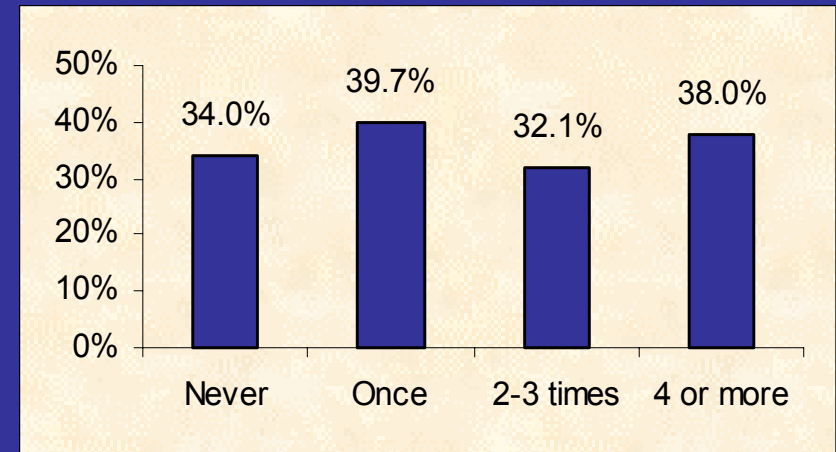


Build Interest → Comparative Interest in Visitation

Impact of Media on Interest



Impact of Frequency of Viewing on Interest





Summary

■ Competitive Situation

- California has a strong image – fun, scenic, diverse
- Consumers are more aware of the states “product” rather than attitude
- Hawaii has most positive image, but is not primary competition. Nevada is the strongest competitor & California beats out all other states in the region

■ Awareness

- 64% recalled television ad & 16% recalled at least one print ad
- Better performance than the competitors in the market
- Reach is somewhat higher in A markets, but is strong across the board and relates to expenditures





Summary

Message

- TV did an excellent job of communicating the message and generating interest in travel. The California ad performs better than any ad previously tested in this way
- Print creative was less strong, although competitive print was weaker as well

Impact

- Campaign had a positive image impact, but gains, however, were small due to the strong prevailing image.
- Intention to visit California was significantly higher among those exposed to the campaign
- Synergy between television and print had positive impact on interest levels

